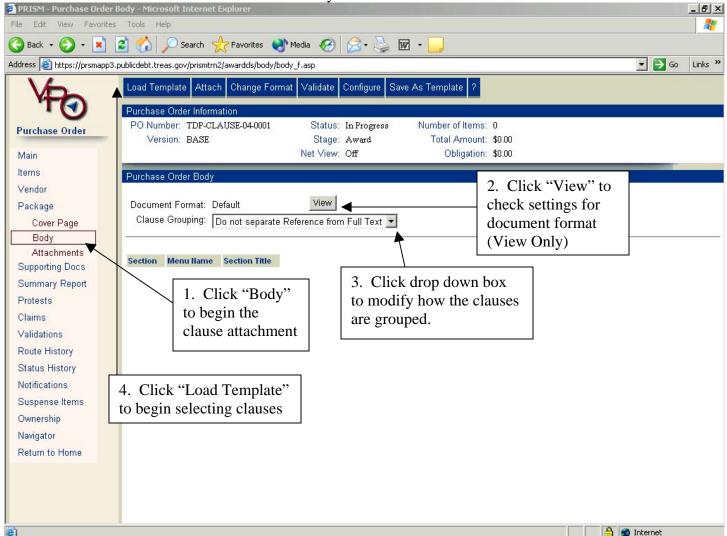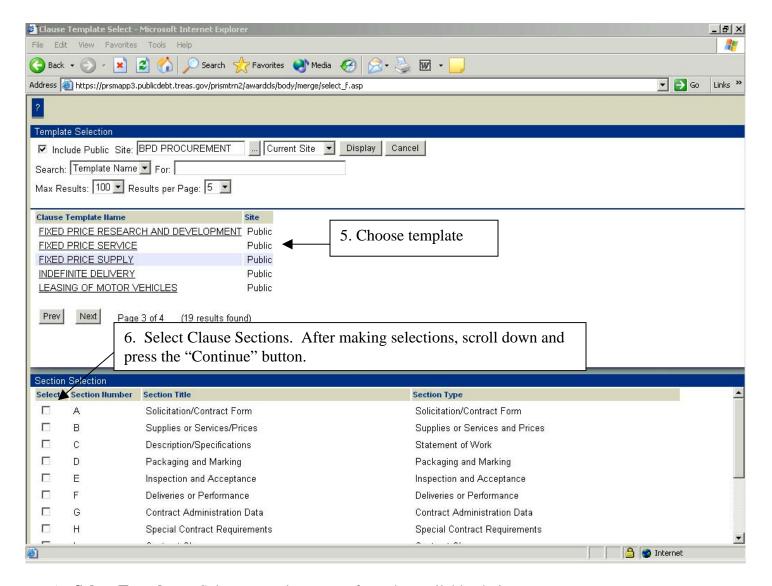# Using the Clause Integration Package
11/23/2004

1. **Choose Package and Body** - After you have created or entered the award document, click on Package in the left hand menu and then choose Body from the sub menu.
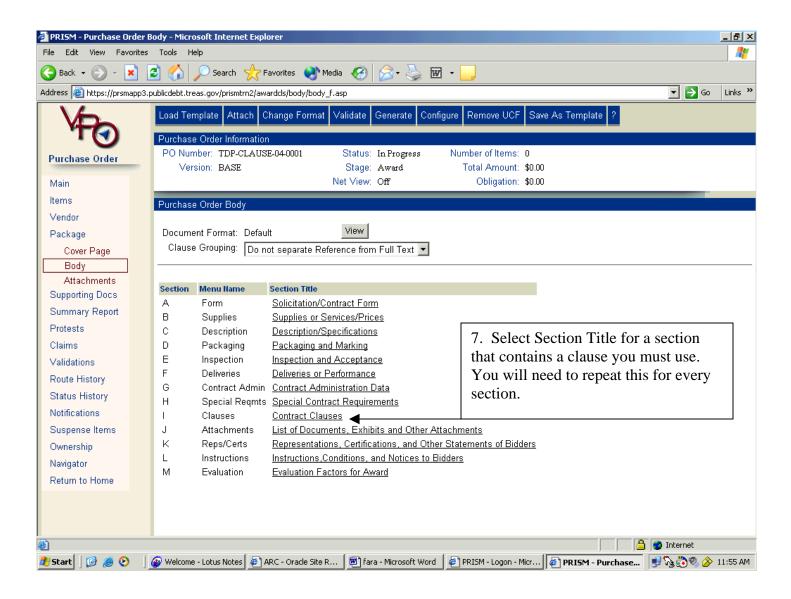


2. **Document Format** - If you would like to view the format in which the document will be printed, click on View button located beside Document Format.  This will give you information related to the font, margins, page numbering, headers and other format parameters.  This section is read only.  If you wish to change the format, you will click on the Change Format button at the top of the screen. If you do not wish to change the default, you do not need to view the settings.
3. **Clause Grouping** – This section allows you to choose the way you want clauses grouped.  The default is "Do not separate Reference from Full Text".  Other choices are "All Reference then all Full Text" and "All Reference then Full Text per database"
4. **Load Template** – To begin selecting clauses, click on the Load Template button at the top of the screen.

**Clause Template Select - Microsoft Internet Explorer**

File   Edit   View   Favorites   Tools   Help

Address | https://prsmapp3.publicdebt.treas.gov/prismtrn2/awardcls/body/merge/select_f.asp

**Template Selection**

☑ Include Public  Site: BPD PROCUREMENT  [...]  Current Site ▼  [Display]  [Cancel]

Search: Template Name ▼  For: [          ]

Max Results: 100 ▼  Results per Page: 5 ▼

| Clause Template Name | Site |
|---|---|
| FIXED PRICE RESEARCH AND DEVELOPMENT | Public |
| FIXED PRICE SERVICE | Public |
| FIXED PRICE SUPPLY | Public |
| INDEFINITE DELIVERY | Public |
| LEASING OF MOTOR VEHICLES | Public |

[Prev]  [Next]   Page 3 of 4   (19 results found)

5. Choose template

6. Select Clause Sections. After making selections, scroll down and press the "Continue" button.

**Section Selection**

| Select | Section Number | Section Title | Section Type |
|---|---|---|---|
| ☐ | A | Solicitation/Contract Form | Solicitation/Contract Form |
| ☐ | B | Supplies or Services/Prices | Supplies or Services and Prices |
| ☐ | C | Description/Specifications | Statement of Work |
| ☐ | D | Packaging and Marking | Packaging and Marking |
| ☐ | E | Inspection and Acceptance | Inspection and Acceptance |
| ☐ | F | Deliveries or Performance | Deliveries or Performance |
| ☐ | G | Contract Administration Data | Contract Administration Data |
| ☐ | H | Special Contract Requirements | Special Contract Requirements |

5. **Select Template** – Select a template to use from the available choices
6. **Select Clause Sections** – Select Clause Sections to be included for the award document. You may do this by clicking in the check box for all of the sections you wish to include or you may select all and then choose which sections to include in the next step. After selecting the sections, you will need to scroll down to the bottom of the screen and click the "Continue" button. This will take you back to the main "Body" page.

7. **Select Clauses within the Sections** – For every section that has clauses that you need to include, click on the "Section Title" for that section. In our example, we will be demonstrating Section I. You will need to complete steps 8 – 12 for every section that has a clause you wish to include.
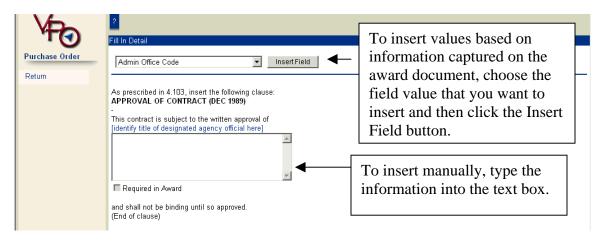


7. Select Section Title for a section that contains a clause you must use. You will need to repeat this for every section.

**PRISM - Clauses - Microsoft Internet Explorer**

Address https://prsmapp3.publicdebt.treas.gov/prismtrn2/awardcls/body/clause/clause_f.asp

| Add | Delete | Save | First | Previous | Next | Last | ? |

**Purchase Order Information**

PO Number: TDP-CLAUSE-04-0001   Status: In Progress   Number of Items: 0
Version: BASE   Stage: Award   Total Amount: $0.00
Net View: Off   Obligation: $0.00

**Clause Summary: Section I**

| Select | Include | Full Text | Clause Number | Local Prescription | Fill In | Clause Title |
|---|---|---|---|---|---|---|
| ▶ | ☑ | ☐ | 52.202-1 | No | No | Definitions. (DEC 2001) |
| | ☐ | ☐ | 52.203-3 | No | No | Gratuities. (APR 1984) |
| | ☑ | ☐ | 52.203-5 | No | No | Covenant Against Contingent Fees. (APR 1984) |
| | ☑ | ☐ | 52.203-6 | No | No | Restrictions on Subcontractor Sales to the Government. (JUL 1995) |
| | ☑ | ☐ | 52.203-7 | No | No | Anti-Kickback Procedures. (JUL 1995) |
| | ☐ | ☐ | 52.203-8 | No | No | Cancellation, Rescission, and Recovery of Funds for Illegal or Improper Activ |
| | ☐ | ☐ | 52.203-10 | No | No | Price or Fee Adjustment for Illegal or Improper Activity. (JAN 1997) |
| | ☐ | ☐ | 52.203-12 | No | No | Limitation on Payments to Influence Certain Federal Transactions. (JUN 200 |
| | ☑ | ☑ | 52.204-1 | No | Yes | Approval of Contract. (DEC 1989) |
| | ☐ | ☐ | 52.204-2 | No | No | Security Requirements. (AUG 1996) |
| | ☐ | ☐ | 52.204-4 | No | No | Printed or Copied Double-Sided on Recycled Paper. (AUG 2000) |
| | ☐ | ☐ | 52.204-7 | No | No | Central Contractor Registra |
| | ☐ | ☐ | 52.207-3 | No | No | Right of First Refusal of Em |
| | ☐ | ☐ | 52.207-5 | No | No | Option to Purchase Equipm |
| | ☐ | ☑ | 52.208-8 | No | No | Required Sources for Heliu |
| | ☑ | ☐ | 52.208-9 | No | No | Contractor Use of Mandatory Sources of Supply of Services. (FEB 2002) |
| | ☐ | ☑ | 52.209-1 | No | Yes | Qualification Requirements. (FEB 1995) |
| | ☐ | ☐ | 52.209-3 | No | Yes | First Article Approval - Contractor Testing. (SEP 1989) |

> 12. If the Fill In column has a Yes value, you will be able to choose selected values for the Clause.

> 8. Mark Include check box for each clause you want to include.

> 10. If you wish to see the Clause definition and the FAR prescription, click on the Clause Number

> 11. Local Prescriptions are available if the value is Yes for the column.

> 9. Mark Full Text check box if you want to include items as Full Text as opposed to Reference

8. **Include Check box** – If you wish to include this clause on your award, click the check box in the "Include" column beside of the clause number. If the check box is gray, you will be unable to change the default and the clause will be included.

9. **Full Text Check box** – The items will be included as reference items unless you indicate that they should be included as Full Text by clicking in the Full Text Checkbox. If the check box is gray, you will be unable to change the default and the item will be included as Full Text.

10. **Clause Number** – By clicking on the Clause Number, you will be able to view the clause definition of the clause and be able to view the FAR prescription.

11. **Local Prescriptions** – If a Local Prescription has been provided, a value of Yes will appear and information related to the Local Prescription will be available for review.

12. **Fill In** – If the ability to fill in a value(s) for the clause exists, the value of Yes will be present and the user will be able to complete the available section of the clause with the value they select. See the following page for additional details and an example.

(See 12. on the previous page for additional information.)
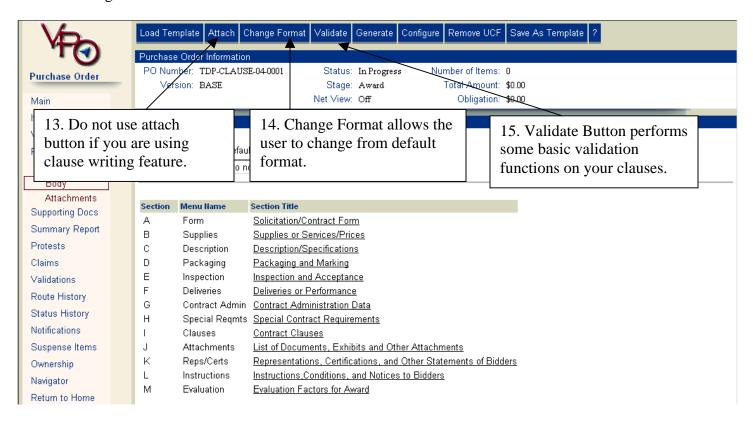
Fill In Screen

You may insert the information into the clause by either
   A. Typing in the text box or
   B. Clicking in the text box and then clicking on drop down box next to the Insert field button, choosing the value to insert (such as Buyer) and then clicking on the Insert Field button.  This will pull the information automatically from the award document.
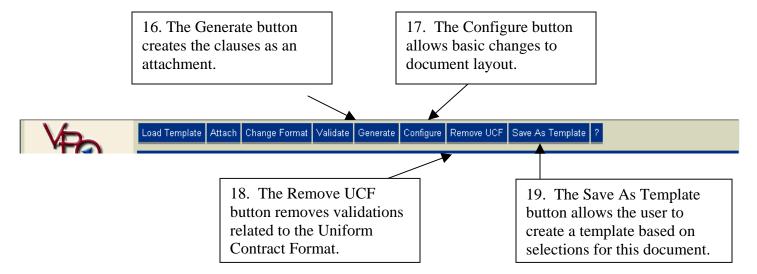


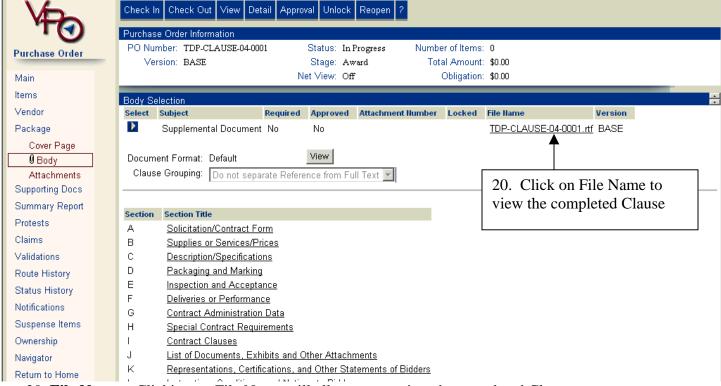When Fill In is complete, click on Return in the left hand menu.

13. **Attach Button** – **DO NOT** attach documents using this button if you are going to use the clause writing module.  Attaching documents will prevent you from being able to access and generate clauses.
14. **Change Format Button** – If you wish the document to be available in a format other than default, click on the Change Format Button
15. **Validate Button** – Once you have completed the clause section, you may click the validate button to perform some basic clause validations.  Validation failures will contain a description with instructions assisting you in clearing the error.  If there were no validations errors present, you will receive the message "No Conflicts Found"

16. **Generate Button** – The Generate Button will perform a validation check and then create the clauses as a file attachment. Once you have generated the document, the buttons will change and you will not have the selections shown in this QRG.

17. **Configure Button** – Allows very basic edit capabilities to the layout of the clauses. This option is not available once the document has been generated.

18. **Remove UCF Button** – Clicking on the Remove UCF button will remove the Uniform Contract Format validations present in the system. When you click this button, you will receive a warning message telling you that the action cannot be undone. If you proceed, you will be unable to put the validations back on the document.

19. **Save As Template Button** - The Save As Template button allows the user to save all the options and configuration of the clauses on this document as a template for future use.

16. The Generate button creates the clauses as an attachment.

17. The Configure button allows basic changes to document layout.

Load Template | Attach | Change Format | Validate | Generate | Configure | Remove UCF | Save As Template | ?

18. The Remove UCF button removes validations related to the Uniform Contract Format.

19. The Save As Template button allows the user to create a template based on selections for this document.

After you have generated the document, the screens appearance and choices will be updated similar to below

Check In | Check Out | View | Detail | Approval | Unlock | Reopen | ?

**Purchase Order**

Purchase Order Information
PO Number: TDP-CLAUSE-04-0001       Status: In Progress       Number of Items: 0
Version: BASE       Stage: Award       Total Amount: $0.00
Net View: Off       Obligation: $0.00

Main
Items
Vendor
Package
　Cover Page
　Ø Body
　Attachments
Supporting Docs
Summary Report
Protests
Claims
Validations
Route History
Status History
Notifications
Suspense Items
Ownership
Navigator
Return to Home

Body Selection

| Select | Subject | Required | Approved | Attachment Number | Locked | File Name | Version |
|---|---|---|---|---|---|---|---|
| ▶ | Supplemental Document | No | No | | | TDP-CLAUSE-04-0001.rtf | BASE |

Document Format: Default       [View]
Clause Grouping: [Do not separate Reference from Full Text ▼]

20. Click on File Name to view the completed Clause

| Section | Section Title |
|---|---|
| A | Solicitation/Contract Form |
| B | Supplies or Services/Prices |
| C | Description/Specifications |
| D | Packaging and Marking |
| E | Inspection and Acceptance |
| F | Deliveries or Performance |
| G | Contract Administration Data |
| H | Special Contract Requirements |
| I | Contract Clauses |
| J | List of Documents, Exhibits and Other Attachments |
| K | Representations, Certifications, and Other Statements of Bidders |

20. **File Name** – Clicking on File Name will allow you to view the completed Clause.

This completes the basic steps for creating a clause within Prism.